

# Invoice Header

The screenshot shows a software interface for creating an invoice header. The form is divided into several sections with various input fields and dropdown menus. The top section includes fields for Client (Sandbox), Organization (Manufacturing Discrete), Order (60446\_10/11/2023), Date Ordered (10/11/2023), Document No (T-79), and Order Reference. Below this is a Description field. The middle section contains Target Document Type (AR Invoice), Date Invoiced (10/11/2023), Business Partner (Tech equipment), User/Contact, Price List (Sales Price List), Account Date (10/11/2023), Partner Location (Coimbatore), Place of supply, Currency (INR), Sales Representative (Discrete User), External Agency, Payment Rule (Cheque), and a checkbox for Is Payment. A 'Create lines from' button is at the bottom of this section. The bottom section, titled 'Reference', includes Project, Campaign, and Place of supply fields. The 'Status' section shows Total Lines (0.00), Grand Total (0.00), Document Status (Drafted), Document Type (\*\* New \*\*), and a checkbox for Pay Schedule valid. There is also a 'Cash Plan Line' field, a 'Generate Withholding' button, and a 'Withholding Amount' field (0.00). A 'Document Action' button is located in the center of the bottom section.

Home (176) Invoice (Customer): T-79 x

Invoice

1 Line - 2,500.00 - Total: -2,960.00 INR - 2,960.00

Client: Sandbox Organization: Manufacturing Discrete

Order: 60446\_10/11/2023 Date Ordered: 10/11/2023

Document No: T-79 Order Reference:

Description:

Target Document Type: AR Invoice

Date Invoiced: 10/11/2023

Business Partner: Tech equipment

User/Contact:

Price List: Sales Price List

Account Date: 10/11/2023

Partner Location: Coimbatore

Place of supply:

Currency: INR

Sales Representative: Discrete User

External Agency:

Payment Rule: Cheque

☐ Is Payment

Create lines from

▼ Reference

Project: Place of supply:

Campaign:

▼ Status

Total Lines: 0.00 Grand Total: 0.00

Document Status: Drafted Document Type: \*\* New \*\*

☐ Pay Schedule valid

Cash Plan Line:

Generate Withholding

Withholding Amount: 0.00

Document Action

☐ IsFixedAssetInvoice

Detail record

## Critical Fields:

1. **Business Partner:** We can select existing/new customers here and this field used to maintain the customer
2. **Partner location:** This field is updated automatically, based on business partner selection, and also updates the site manually
3. **Price list:** The price list will be selected in the product master once we choose the product price list will display automatically and the user also select manually
4. **Payment Rule:** This field used to select the payment type
- 4.1 **Cash:** After receiving the invoice, the customer pays the invoice amount through cash only

4.2 Check: After receiving the invoice, the customer pays the invoice amount through a check

4.3 Credit Card: Payment amount paid to vendor to use Credit Card

4.4 Direct Debit: Payment amount paid to direct vendor account number

4.5 Mixed POS Payment

4.6 NEFT

4.7 On Credit

4.8 RTGS: Payment amount paid to RTGS

5. Payment term: The terms of payment (Immediate, 30 days, etc)

6. Sales representative: This field updates automatically based on system login through the user name

7. Order: Once the sales or shipment document number is selected and saved, the document is updated automatically

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## **Critical & one-time setup fields:**

1. Organization: This field is used to select the organization

2. Target Document Type- This Field is used to select the type of document that you are going to process

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## **Non-Critical Field:**

1. Order: This field is used to complete an invoice transaction using a Sales order reference. We can simply paste the sales order document number or choose the sales orders that need to be invoiced.

2. Order Reference: Notes, Document, and Important Information for this Order.

3. Description: Used to describe specifics about an Invoice document or any other note, information, or data, for example.

4. User contact: He is the contact person on that particular vendor side.
  5. Place of supply: Where should the despatch material/item/products be delivered(As stated by the states)
  6. Project: If this order is processed against a project user can tag the project for tracking.
  7. Campaign: Campaign Details of the project are processed against the order
  8. Cash plan line: It is a master that is used to maintain a particular cash plan for this particular order.
  9. Discount Printed Checkbox (Invoicing): To print Discount Details on Report
  10. Ispayment: select this checkbox to generate the payment from the invoice expense window.
  11. Bank Account: select the bank account number to do the payment
  - 12.External Agency : It is used to select the existing business partner name.
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## **Serial number/Lot number (ASI):**

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## **Zoom condition:**

1. Shipment customer
  2. Sales order
  3. Receipt
  4. Service Request
  5. View TDS
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## **Customization:**

### **1.Ctreate lines From Customer DC :**

1. The Create lines From Customer Dc Button is used to select the Data from the Customer Material DC Outgoing Transactions.
2. In this form we have 2 filter options like Date and the Outgoing Dc Product.
3. Service Product For Outgoing Product Should be maintained in the Product Master Related Product Tab.
4. By Using this Option We can Directly Create Invoices For the Customer Material DC Services Charges without the Sales Order References.

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